

**DISCOVERY SERVICES:  
A WHITE PAPER FOR THE TEXAS STATE LIBRARY & ARCHIVES COMMISSION**

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## EXECUTIVE SUMMARY

Discussions among libraries that have recently implemented discovery services are likely to result in agreement that implementation was challenging. However, once implemented, librarians are generally happy with their decisions to offer discovery services to their patrons. Based on librarian experiences of both the challenges and rewards of implementing a discovery service, the Texas State Library and Archives Commission (TSLAC) contracted with Amigos Library Services to write a white paper that would include basic information concerning discovery services, as well as an overview of the major discovery vendors. Below is an overview of information contained in this document.

### DEFINITIONS

From NISO: These services use an aggregated central index to enable searching across a wide range of library related resources – both licensed and free – from multiple providers. They also offer more sophisticated capabilities and faster performance than those provided by systems relying on federated search technologies.

For patrons: Google-like search experience for all library resources.

For librarians: A web-scale, index-based search service that includes local and remote library resources, including full-text article-level content as well as delivery of physical resources.

### CURRENT STATE OF DISCOVERY SERVICES

Basic functionality for discovery services is currently available. Additional work is necessary that will allow this technology to work to its potential: best practices, communication between the discovery service and the content provider, and stability.

### ADVANTAGES

- Leverages a library's existing resources
- Single interface for searching multiple resources
- Clear starting point for research
- Search results are more specific to a patron's needs than using a search engine
- Results are displayed more quickly than in federated searches
- Allows patrons to see and evaluate what is available immediately as well as those that will take more time

### DISADVANTAGES

- Implementation costs for a discovery service include more than the cost of the service. Other costs include staff time to map data elements of the databases,

to understand how the service defines terms like “relevancy” and to determine how to teach and market it.

- Patrons have an expectation that everything is available when using a single search box, but that may not be true.
- Integrating your ILS into a discovery system will take time.

### LIMITATIONS

- Completeness. Not all resources work well in a discovery service.
- Relevancy ranking. It is difficult to perfect relevancy searching when the metadata is coming from many disparate sources.
- Speed. How quickly results display is dependent on many things, and sometimes performance is slower than anticipated.

### AREAS OF A LIBRARY MOST IMPACTED BY A DISCOVERY SERVICE

- Staff who have responsibility for the library’s website
- Librarians who deal with e-resources
- Reference staff
- Cataloging and metadata staff
- Librarians who provide bibliographic instruction
- Interlibrary loan librarians

### WHAT TO LOOK FOR IN A DISCOVERY SERVICE

- Usage statistic functionality
- How relevancy is determined
- What is included in the central index
- How the discovery layer works

### BEST PRACTICES FOR IMPLEMENTING A DISCOVERY SERVICE

Steps to implementing a discovery service should include:

- Identify target audience
- Build a central index that includes databases of interest to your target audience(s)
- Set up the authentication process
- Customize the service
- Design the default presentation of the search box
- Refine search and retrieval options
- Test usability
- Enhance the service by integrating with other services such as Blackboard, LibGuides, RefWorks and Zotero

- Provide instruction and documentation of the service

### EVALUATING A DISCOVERY SERVICE

- Work with the selected vendor and key project stakeholders to identify and troubleshoot the efficiency of the new system
- Recognize how your new discovery system covers resources and indexes them, what you can learn from usage statistics and relevancy rankings and how your selected vendor interacts with you on an on-going basis
- Understand the contractual agreements and the type of support you should receive
- Measure resource usage against what the vendor advertises
- Utilizing usage statistics, determine which library resources are being found and which are not
- Determine how your discovery vendor determines relevance
- Determine how you will test to evaluate the discovery service
- Be aware of new developments or enhancements to your system